Banner Navigation
What we will cover

• A step by step guide:
  • Banner Navigation
  • Budget Queries
  • Access Salaries/Benefits
1. Log in to EZ Arts
2. Select Finance
4. Select New Query

5. Select Query Type: Budget Status by Account
6. Enter the fund in the Index field. The Fund, Organization and Program information automatically defaults into the correct fields, thereby eliminating any chance for error.
7. Scroll down and Complete the following:

- **Fiscal Year**: Example - 2022-2023 is FY2023

- **Fiscal Period**: Example - UNCSA's fiscal year is from July 1 – June 30. Fiscal Period 1 - July, 2 - August, 3 - September, and so forth

- **Comparison Fiscal Year** and **Comparison Fiscal Period**: Used to compare data between fiscal years/periods. To look at this year’s data only, select “None”.

![Form Fields]

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Fiscal Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comparison Fiscal Year</th>
<th>Comparison Fiscal Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
8. Scroll down and select the columns you wish to see on query. Click Submit.
9. The report is ready to be reviewed. Note column headings representing step #8.

10. To view detailed information for any budget or expenditure amount, click on any of the hyper-linked options in blue. Also, use the arrow to download in excel.
10. The available balance can also be viewed in Banner 9 Self-service. Create another query and **choose 611100 as the account**. Click submit at the bottom.
11. The screen below will appear and choose View Available Balance from the three dots.
12. Below is how the Available Balance will appear. The posted amount is your Budget-YTD expenses-Encumbrances.
13. To View Payroll (Salaries/Benefits) click on the three dots and choose View Payroll
14. The information below will appear after clicking on the View payroll tab. A Download arrow will appear at the top to view the salaries and benefits in excel.
Links

• Expenditure Accounts: (https://www.uncsa.edu/mysa/faculty-staff/working-at-uncsa/financial-services/docs/banner-account-descriptions.pdf)

• Revenue Accounts: (https://www.uncsa.edu/mysa/faculty-staff/faculty-resources/faculty_docs/Revenue%20Account%20Numbers.pdf)

• View Payroll expense tab access: Email Steve Cochrane (Cochranes@uncsa.edu)
Summary

This step-by-step process should be used to do your daily/weekly review of funds in Banner. In addition, this should be done to verify available balance BEFORE:

- Making Budget Transfers/Request
- Purchases (P-Cards and P.O’s)
- Paying Invoices
- Hiring actions and/or salary adjustments
Questions?